

# Trends for 2011: Telco Operations

<https://marketpublishers.com/r/TB3F5EBA816EN.html>

Date: December 2010

Pages: 12

Price: US\$ 1,500.00 (Single User License)

ID: TB3F5EBA816EN

## Abstracts

### Introduction

This report looks at the trends in telco operations that Ovum expects to occur during 2011, taking into account the economic constraints and competitive market conditions that telcos are facing.

### Features and benefits

Outlines how the uneven nature of the global economic recovery will affect telcos during 2011.

**Highlights** what Ovum identifies as the key trends in telco operations during 2011.

### Highlights

The knock-on effect from cuts to EU spending could make it difficult for many telcos, with reduced government telecoms budgets and consumer spending hitting telco's top lines at a time when they are struggling to achieve growth. Despite this uncertain outlook, we expect telco investment to increase in the short term, fuelled by the need to invest in infrastructure to stay ahead of the competition and to drive growth from potential new sources of revenue.

### Your key questions answered

What macro-level trends can we expect to see in the telecoms industry during 2011, and how does this link to economic growth and market conditions?

How are telcos evolving their operations, and what are the key investment areas?

## Contents

### SUMMARY

In a nutshell  
Ovum view  
Key messages

### ECONOMIC UNCERTAINTY CONTINUES

Slower global economic growth predicted for 2011  
Uneven recovery in economic markets will impact telcos  
Market, not economic factors will boost telco capital spending  
Opex will continue to come under pressure as revenue growth slows

### TELCO INVESTMENT

Investment geared towards stimulating revenue growth  
Investment in improving the customer experience  
Transformation of telcos' operations gathers pace  
Driving further improvements in agility and efficiency across business processes  
Managed services and outsourcing continue to gather pace

### APPENDIX

Methodology  
Further reading  
Author  
Ovum Consulting  
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